

Writing Memos

Definition of a Memo

A memo is a document typically used for communication within a company. memos can be as formal as a business letter and used to present a report. However, the heading and overall tone make a memo different from a business letter. Because you generally send memos to co-workers and colleagues, it is not required to include a formal salutation or closing remark. It is important to have your audience and purpose clearly defined, because this will help you determine what information to include and how best to convey it.

Purpose of a Memo

Usually you write memos to inform readers of specific information. You might also write a memo to persuade others to take action, give feedback on an issue, or react to a situation. However, most memos communicate basic information, such as meeting times or due dates.

While memos are a convenient channel to communicate, it is always necessary to determine if a meeting is more appropriate. For example, pretend your team needs to make a very important financial decision. A memo can ask for that information from team members and request a response by a specific date.

By meeting with everyone, however, you not only get to hear final decisions but the rationale behind them. In fact, new ideas may stem from face-to-face discussions. By writing a memo in this scenario, you may never invent alternative ways of solving the problem.

Before writing a memo, outline what your purpose is for doing so, and decide if the memo is the best communication channel.

Audience Analysis

The typical audience for a memo is your co-workers and colleagues. However, in the age of downsizing, outsourcing, and teleconferencing, you might also write memos to employees from other companies working on the project, or other departments within your company.

This is why knowing your audience is very important when writing a memo. For example, if your audience is generally familiar with you professionally and/or your role in the project, it is not necessary to provide a detailed background about your purpose. If they are new to the project, provide detailed background information so that they understand the situation and can provide constructive feedback if desired.

It is helpful, however, to inform readers about the context. In other words, do not only write that a meeting will take place by listing the date and time. Inform why the meeting is occurring in the first place. Also, do not assume that your readers have contact information. Always include some way for them to get in touch with you and other members of the team working on the project.

When composing academic memos (i.e. for school), consider what this audience already knows about the subject. For example, if you are writing a memo for a paper, does your audience already know what the paper is about? What further information do they require to provide understanding?

When writing a memo, consider the audience's knowledge of the topic and previous experience, and draft your memo to take care of those needs

General Format

When you write a memo, you will follow a general format. Some organizations may have specific requirement or house styles. For instance, a company might have a particular way of presenting a heading or may even use a specific type of letterhead or logo.

However, usually a memo has a "to," "from," "subject," and "date" entry.

Heading

A memo's heading provides information about who will receive the memo, who is sending the memo, the date, and the memo's subject. This information may be bolded or highlighted in some way. For example:

TO:

FROM:

DATE:

SUBJECT:

It is a good idea to include your job title and your reader's. The memo will then be informative to someone new to the situation, or someone who received the memo after it was passed on from the original reader.

Message

Memos are reproduced and exchanged rather freely, and it is common for a reader to receive a memo that is only marginally relevant to him or her. This is why it is important that the first sentence of the memo should answer that question with a purpose statement. The best purpose statements are concise and direct.

Your memo's message should also provide a context for readers. In other words, always tell your readers why you are writing. Consider the following questions:

Is your memo a result of a situation? For instance, "As a result of yesterday's meeting..."

Is your memo a reminder? For example, "The Proposal is due July 2."

By providing context for your readers, you avoid being asked to provide that information later. Also, you should always include your contact information at the bottom of your message. This can be your phone number or e-mail address.

Finally, consider how your memo looks. If you have nothing but paragraph after paragraph of text, you might use lists to draw attention to specific information. Lists represent an effective way to present information. Not only do they breakdown large amounts of text, but they also provide text in a way that is visually pleasing. Lists are especially useful for conveying steps, phases, years, procedures, or decisions. By avoiding full sentences in a list, your information is concise and more likely to engage your readers. For example:

"To receive a degree in engineering, you must complete the following:"

1. Core Courses
2. Elective Courses
3. Senior Design

Lists can be bulleted, as in the example, or numbered. Typically, you should use a numbered list when you need to stress the order of the listed items.

Tone

Since you typically send memos to those working within your company, you can use a more informal tone than you would if you were writing a business letter.

For example, you might refer to your colleagues by their first names or use humor. However, always keep in mind that you still need to be professional. Ask yourself how the company's president would react to your memo. If you would be embarrassed to have the president read your memo, consider changing or eliminating information.

Length

Memos are generally short, concise documents. However, you may have to write longer memos, depending on your topic. For example, a memo might present the new guidelines for a specific office task.

Obviously, if you have over forty guidelines, the memo will be more than a page. Some memos might even introduce a short report. In this case, you might include the report in the memo, or the memo might be a separate document, introducing the report.

Format Guidelines

Regardless of the style, memos generally have similar format characteristics, unless otherwise specified by your professor or company. Listed below are some basic guidelines that can help you create a memo:

- Memos have one-inch margins around the page and are on plain paper
- All lines of the memo begin at the left margin
- The text begins two spaces after the subject line
- The body of the memo is single-spaced, with two spaces between paragraphs
- Second-page headings are used, as in business letters
- The second page includes who the Memo is to, the page number, and the date
- The sender usually signs the Memo using initials, first name, or complete name

Common Types of Memos

Each memo is written for a specific purpose to a specific audience. The purpose and audience for your memo will help guide what type of memo you will write.

Even though no two memos are identical, four common broad categories exist. If you are unsure about how to format your memo, ask your instructor or review memos your co-workers have written.

Directive Memo

A directive memo states a policy or procedure you want the reader or co-worker to follow. The length of the memo depends on how much space is required to properly explain the procedure.

The body of the memo should begin with a clear, concise sentence that states the purpose of the memo. For example:

"The purpose of this memo is to let all members of the ABC department know that doughnuts will be provided every Friday morning at 8 a.m."

You then provide statements that explain the rationale for such a decision or procedure.

Example Directive Memo

MEMORANDUM

TO: Design Team #362
FROM: W.B. Working
DATE: May 27, 1997
SUBJECT: Project Schedule

As a result of yesterday's meeting, I suggest we follow the project schedule listed below. Remember, we must submit a Proposal by noon on July 2.

Schedule

<u>Task</u>	<u>Completion Date</u>
Divide research into groups and compile information	June 6
Review designs from Kate and Bill.	June 11
Write Proposal	June 23
Review Proposal	June 26
Submit Proposal for printing	June 27

Response Memo

The purpose of this memo is to provide the audience with desired information. It usually has four parts:

- purpose statement
- summary
- discussion
- action

Begin this memo with a short paragraph stating the purpose, which is always to respond to a request for information. Next, summarize the information requested.

Third, in a discussion section, point out to the reader any important information that you feel should be highlighted or stressed.

Finally, in the action section, state any additional action you are going to take or feel should be taken to properly address the original request for information.

*Example Response Memo***MEMORANDUM**

TO: Design Team #362
FROM: W.B. Working
DATE: May 27, 1997
SUBJECT: Project Schedule

Purpose: This memo responds to your request that the weekly meeting be moved from 9am to 10am.

Summary: This request is satisfactory as long as it is approved by management.

Discussion: Management usually has no problem with the individual time changes in meetings, as long as meeting minutes are turned in by noon to Cathy.

Action: I have asked Cathy if she thinks this would be a problem and she said no, so all we need to do now is get approval from Steve.

Trip Report Memo

A trip report memo is usually sent to a supervisor after an employee returns from a business venture. The structure is listed below:

- purpose statement
- summary
- discussion
- action

Begin this memo with a short paragraph stating the purpose, which is always to provide information on your trip.

Next, summarize the trip. Remember, the reader is usually not interested in a detailed minute by minute account of what happened. Instead, take the time to write a clear and concise outline of your trip.

Third, in a discussion section, point out to the reader any important information that you feel should be highlighted or stressed.

Finally, in the action section, state any additional relevant information you have come across since returning from the trip or any recommendations you might have for the reader.

*Example Trip Report Memo***MEMORANDUM**

TO: Design Team #362
FROM: W.B. Working
DATE: June 27, 1997
SUBJECT: Weekly Meeting

Purpose: This memo presents my impressions of the meeting last week.

Summary: In general, I felt that the meeting went well and much progress was made.

Discussion: Barb and Jeff were able to make progress on the graphics and should have them finished next week. Kyle and Sandy are on Chapter 2 of the user manual.

Recommendation: Kyle will meet with Jeff to see how they want the graphics integrated into the text.

Field Report Memo

Memos are often used to report on inspection and procedures. These memos, known as field or lab reports, include the problem, methods, results, and conclusions, but spend less time on the methods section. A field or lab report memo has the following structure:

1. purpose of memo
2. summary
3. problem leading to the decision to perform the procedure
4. methods
5. results
6. conclusions
7. recommendations

Example Field/Lab Reports Memo

MEMORANDUM

TO: Dean of Journalism
FROM: Steve Nash
DATE: June 27, 1999
SUBJECT: Computer Lab

Purpose: This memo presents my the findings of my visit to the computer lab at Clark C252.

Summary: In general, I felt that the lab needs much new equipment and renovation.

Problem: The inspection was designed to determine if the present equipment was adequate to provide graduate students with the technology needed to perform the tasks expected of them by their professors and thesis research.

Methods: I ran a series of tasks on SPSS and WordPerfect and recorded memory capacity and processing time for each task.

Results: The inspection found that the hardware used to run the computers is outdated and that the computers itself are very slow.

Conclusions: This lab is inadequate for the everyday needs of graduate students in this department.

Recommendations: Four new computers running on Windows98 and a processing speed of at least 233mhz should be purchased immediately.